High-Level Automation Blueprint for Soleil Pharmacy

Based on Thuy's mandate to eliminate legacy channels (fax/phone) and drive everything through the portal/eRx, the journey is:

1. Prescription Journey Map (High-Level)

- **Stage 1: Provider Acquisition & Onboarding** (B2B Outreach → Portal Sign-up)
- **Stage 2: Prescription Intake** (Provider submits Formula-ID via Portal or eRx)
- **Stage 3: Data Entry & Verification** (Pioneer Rx sync/entry + Pharmacist Review)
- **Stage 4: Patient Payment & Consent** (Patient receives invoice and signs HIPAA/consent)
- **Stage 5: Fulfillment / Compounding** (Sterile vs. Non-Sterile prep in Pioneer)
- **Stage 6: Dispensing** (Shipping or local pickup)
- **Stage 7: Follow-up & Refills** (Patient adherence check and automatic refill prompts)

2. Automation Opportunities by Stage

Stage 1: Provider Acquisition & Onboarding

- **Automate in GHL:** Welcome sequence, delivery of the "Portal Setup Guide," and sequence to schedule a 1-on-1 onboarding call.
- **Manual:** SDR calls, verification of NPI/Credentials.
- **Trigger:** Form submission (Provider Interest) or manual tag `B2B-Lead`.
- **Action:** Send Welcome Email + SMS; Create Opportunity in "Provider Pipeline"; Assign task to SDR.
- **Exit Condition:** Tag added `Portal-Activated`.

Stage 2: Prescription Intake

- **Automate in GHL:** Internal alert to pharmacy staff; create/update Patient Opportunity in "Rx Pipeline." Send "Rx Received" confirmation to the provider.
- **Manual:** Very few, assuming the provider uses the portal. Exception handling (AI/OCR extraction) if fax is used as a temporary bridge.
- **Trigger:** Webhook from Prescriber Portal / eRx system.
- **Action:** Add/Update Contact; Move Pipeline Stage to "Rx Received"; Notify Internal Staff.
- **Exit Condition:** Rx verified by pharmacist.

Stage 3 & 4: Patient Payment & Consent

- **Automate in GHL:** Reach out to the patient to collect payment and digital signatures (HIPAA/Consent). Chase sequences for unpaid invoices (24hr, 48hr reminders).
- **Manual:** Calling patients who fail to respond to digital payment links after 3 days.
- **Trigger:** Pipeline stage changes to "Pending Payment".
- **Action:** Send secure SMS/Email with payment/consent link. Wait 24 hrs -> If unpaid, send reminder.
- **Exit Condition:** Payment complete (moves pipeline to "Ready to Fill" / "Compounding").

Stage 5: Fulfillment / Compounding

- **Automate in GHL:** Minimal. Keep GHL out of the clinical compounding workflow. Thuy's model uses Pioneer as the operational source of truth here.
- **Manual:** All sterile/non-sterile compounding SOPs, pharmacist checks.
- **Trigger:** Webhook from Pioneer (Status: Verified) OR manual GHL pipeline update.
- **Action:** Move opportunity to "Compounding".
- **Exit Condition:** Medication is finished and ready.

Stage 6: Dispensing (Shipping/Pickup)

- **Automate in GHL:** Notify patient that their medication is ready or has shipped. Provide tracking numbers.
- **Manual:** Handing medication to patient or packing boxes.
- **Trigger:** Pipeline stage updated to "Shipped" or "Ready for Pickup".
- **Action:** Send SMS/Email with tracking link or pickup instructions.
- **Exit Condition:** Medication received by patient.

Stage 7: Follow-up & Refills

- **Automate in GHL:** 30/60/90-day check-ins. Refill reminders to patients and adherence reports back to the provider.
- **Manual:** Pharmacist consultation if patient reports adverse effects.
- **Trigger:** "Shipped" date + 21 days (for a 30-day supply).
- **Action:** Send SMS "Do you need a refill?" If yes, route back to Stage 4 or alert Provider.
- **Exit Condition:** Refill Rx generated.

3. Required GoHighLevel Assets

Pipelines / Stages:

1. **B2B Provider Sales Pipeline:** Lead → Contacted → Demo Scheduled → Credentialing → Portal Activated.
2. **Patient Rx Fulfillment Pipeline:** Rx Received → Pending Payment → Compounding → Ready for Pickup/Shipped → Complete.

Tags:

- `B2B-Lead` , `Portal-Activated` , `Legacy-Fax-User` (for providers needing portal training)
- `Rx-Received` , `Payment-Pending` , `Shipped` , `Refill-Due`

Custom Fields:

- Provider: `NPI Number` , `Clinic Name` , `Preferred Communication`
- Patient: `Pioneer Rx #` , `Formula ID` , `Tracking Number` , `Prescriber Name`

Forms / Surveys:

- Provider Inquiry Form
- Patient Digital Intake & Consent Form (Secure)

Workflows:

- B2B Lead Nurture & Onboarding
- Patient Payment Collection & Chase Sequence
- Order Status Updates (Processing, Shipped, Pickup)
- Refill Reminder Sequence (21-day, 45-day, etc.)

Email / SMS Templates:

- "Welcome to Soleil Prescriber Portal" (Email)
- "Invoice & Consent Required" (SMS/Email - generic messaging for privacy)
- "Your order has shipped" (SMS)

4. Compliance / Risk Considerations

- **HIPAA Compliance Mode:** GHL must be set to HIPAA compliance mode (requires the $297+ plan and signed BAA).
- **PHI in Communications:** SMS and Email templates must *never* contain the medication name, clinical conditions, or sensitive PHI. Use generic messaging: *"Your order from Soleil Pharmacy requires attention. Please click here to view."*
- **Source of Truth:** GHL is strictly for CRM, communication, and commercial metrics. Pioneer remains the undisputed operational source of truth for auditable clinical workflows.

5. Recommended Build Order

- **Phase 1 (Must-Have): Patient Revenue & Communication Engine**
  - Setup HIPAA compliance in GHL.
  - Patient Rx Fulfillment Pipeline.
  - Automated Payment & Consent SMS/Email sequences (crucial for cash flow).
  - Basic Order Status notifications (Shipped/Pickup).

- **Phase 2 (Optimization): Provider Onboarding & B2B Engine**
  - B2B Provider Sales Pipeline.
  - Automated portal onboarding sequence to reduce Thuy's manual training load.
  - Refill reminder workflows.

- **Phase 3 (Advanced Automation): AI Integration & Full Sync**
  - AI/OCR webhook integration to catch and process any legacy faxes, automatically queuing SDR tasks to train that clinic on the portal.
  - Deep integration (via Zapier/Make) between the Prescriber Portal, Pioneer Rx, and GHL to completely automate pipeline stage movement.

AI Assistant Prompt (Short Version)

You can use this prompt in an AI tool to generate specific GoHighLevel workflow steps:

"Act as a GoHighLevel workflow expert. I am building a HIPAA-compliant pharmacy automation for 'Soleil Pharmacy'. Generate the node-by-node logic for a workflow that triggers when a patient enters the 'Pending Payment' stage in the 'Patient Rx Fulfillment' pipeline. The workflow needs to send a secure, generic SMS/email link for payment and digital consent, then wait 24 hours. If no payment is received, send a reminder. If still no payment after another 48 hours, create a manual task for staff to call the patient."